



## 2019 MDRT Top of the Table Annual Meeting e-Handout Material

Title: The Production Line Client Acquisition and

**Development Model** 

**Speaker:** David Blake

**Presentation Date:** Thursday September 26, 2019

**Presentation Time:** 10:30 a.m. -12:00 p.m.

Session Room: Congressional Ballroom B-C

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The Produ	ction Line Client Acquisition and Devel	opment Model
Strategic Relationships	INDUSTRY ASSOCIATIONS	
A/S	GROUP INSURANCE BROKERS	
?	BENEFIT CONSULTANTS	
?	PRACTICE MANAGERS	
?	PROFESSIONAL BUSINESS ADVISORS	

The Prod	uction Line Client Acquisition and Development Model
Sr  Ars  Anstitutional sales	REVIEW CURRENT COVERAGE
Is	SECURE CENSUS DATA
?	SECURE UNDERWRITING OFFERS
?	PRESENT RECOMMENDATIONS

The Prod	uction Line Client Acquisition and Development Model
Sr AS MEDIATION SINCE  ST AS AS MEDIATION SINCE  SS AS AS MEDIATION SINCE  SS AS	COMMUNICATION MATERIALS     PRE-ENROLLMENT AND INTERNAL STAFF PRESENTATIONS
Errollment sales	ENROLLMENT AND RE-ENROLLMENT TIMELINES
? Rs 4	TERMINATION PROCESSES

The Produc	ction Line Client Acquisition and Development Model
Storegic Ricasanships Sr	UPDATING OF RECORDS
AIS A	EVALUATION OF NEW EMPLOYER BENEFITS
Is	CHANGE IN BILLING
Es	SUPPORT OF FUTURE INCREASE OPPORTUNITIES
Customer service	PROMOTE ADDITIONAL PRODUCTS AND SERVICES
RIS 4	INTRODUCE TO LOCAL RELATIONSHIP





